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Hong Kong

Market Development Reports

Hong Kong Fresh Fruits and Vegetables Market

Brief

1999

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Report Highlights:

Hong Kong is a totally import market for fresh fruit. Oranges, grapes, melons, papayas, apples, and bananas represent about 60% of the demand. The U.S.A. dominates orange, grape and apple supplies; whereas melons, papayas and bananas are sourced within Asia. Future growth demand for oranges and apples is expected. A new emerging demand for plums is growing quickly and should be a strategic focus for American suppliers.

The current recession may result in a slight increase in fresh vegetable consumption.

Includes PSD changes: No

Includes Trade Matrix: No

Unscheduled Report

Hong Kong [HK1], HK

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INTRODUCTION

Methodology

The goal of this report is to provide a brief on fresh fruit and vegetable markets in Hong Kong as well as future developments.

Due to the large variety of products in discussion, this report, separates the brief into two segments:

- (1) Fresh Fruits
- (2) Fresh Vegetables

For Hong Kong dollar currency figures, the exchange rate used is US\$1 = HK\$ 7.78.

Executive Summary

The Hong Kong consumer is highly conscious of the health benefits of fresh fruits and vegetables, which are an important part of the daily diet. Fresh fruit demand growth is steady, whereas fresh vegetable demand has been in steady decline. Fresh fruit consumption dominates (70%) and fresh vegetables are less significant (30%)

Fresh Fruit

Hong Kong is an import market and oranges, grapes, melons, papayas, apples and bananas represent, about 60% of demand. Overall demand growth remains moderate and stable. The USA dominates the orange, grape and apple supply, whereas melons, papayas and bananas are sourced within Asia. Attractive future growth demand is expected for oranges and apples. A new emerging sector, “plums” is also growing quickly, which is a strategic focus for American suppliers.

Fresh Vegetables

Demand has been steadily declining over the past five (5) years due to increased restaurant dining, and a reduction of use of vegetables in home cooking. The USA is a key supplier of lettuce and cabbage and is present in most other categories. China dominates garlic supply.

The poor economic situation in 1998 is expected to result in a slight increase in vegetable consumption.

Market Access Statement

LABELING REQUIREMENTS

The Food and Drugs (Composition and Labeling) Regulations require food manufacturers and packers to label their products in a prescribed, uniform and legible manner. The following information is required to be marked on the label

of all prepackaged food except for ‘exempted items’ as provided in the Regulations. Prepackaged food means any food packaged in such a way that the contents cannot be altered without opening or changing packaging, and the food is ready for presentation to the ultimate consumer or a catering establishment as a single food item.

- 1) Name of the Food
 - a) Prepackaged food shall be legibly marked or labeled with its name or designation.
 - b) The food name should not be false, misleading or deceptive but should serve to make the nature and type of food known to the purchasers.
- 2) List of Ingredients
 - a) Preceded by an appropriate heading consisting of the words “ ingredients”, “composition”, “contents” or words of similar meaning, the ingredients should be listed in descending order of weight or volume determined when the food was packaged.
 - b) If an additive constitutes one of the ingredients of a food, it should be listed by its specific name or by the appropriate category (e.g. Preservative, artificial sweetener, etc.) Or by both name and category.
- 3) Indication of “best before” or “use by” date.

Prepackaged food shall be legibly marked or labeled with the appropriate durability indication as follows:

- a) a “best before” (in Chinese characters as well) date; and
- b) in the case of a prepackaged food which, from a microbiological point of view, is highly perishable and is likely, after a short period, to constitute an immediate danger to human health, a “ use by” (in Chinese characters as well) date.

The words “use by” and “best before” in English lettering and Chinese characters followed by the date up to which specific properties of the food can be retained, to indicate the shelf life of the food. The “use by” or “best before” date should be shown either in Arabic numerals in the order of day, month and year (or month and year in certain circumstances) or in both the English and Chinese languages. For specific details refer to the Regulation.

Home Page: <http://www.info.gov.hk/justice>

- 4) Statement of Special Conditions for Storage or Instruction for Use

If special conditions are required for storage to retain the quality, or special instructions are needed for prepackaged food use, a statement should be legibly marked on the label.

- 5) Name and Address of Manufacturer or Packer

Prepackaged food shall be legibly marked or labeled with the full name and address of the manufacturer or packer, except under the following situations:

- a) The package is marked with an indication of the country of origin and the name and address of the distributor or brand owner in Hong Kong, and the address of the manufacturer or packer of the food in its country of origin has been submitted in writing to the Director of Health.
- b) The package is marked or labeled with an indication of its country of origin and with a code marking identifying the manufacturer or packer in that country and particulars of the code marking and of the manufacturer have been submitted in writing to the Director of Health.
- 6) Count, Weight or Volume

The food label should include the numerical count or net weight or net volume of the food.

- 7) Appropriate Language

The marking or labeling of prepackaged food can be in either the English or the Chinese language or in both languages. If both the English and Chinese languages are used in the labeling or marking of prepackaged food, the name of the food and the list of ingredients shall appear in both languages.

Exempt from labeling regulations: Individually wrapped confectionery products and preserved fruits intended for sale as a single item; Prepackaged foods for sale to catering establishment for immediate consumption and those containing more than 1.2 percent alcohol by volume.

Under the amended Food and Drugs (Composition and Labeling) Regulations, it is illegal to sell any food after its “use by” date. Furthermore, any person who, other than the food manufacturer or packer or without their written authorization, removes or obliterates any information on the label required under these regulations also commits an illegal act.

IMPORT DUTIES

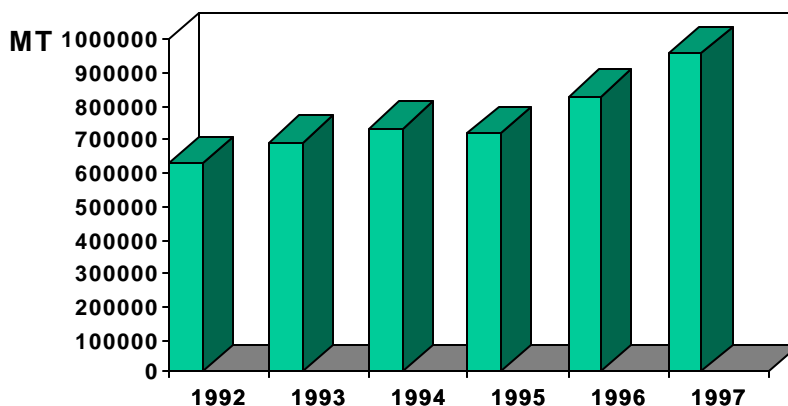
Hong Kong is a free port which does not impose any import tariffs on products with the exception of four dutiable products: liquor, tobacco products, hydrocarbon oils and methyl alcohol. Local importers have to apply for a licence from the Hong Kong Customs and Excise Department for the importation of dutiable commodities. In addition, a licenced importer has to apply for a permit for each and every consignment. The current duties are as follows:

Cigarettes per 1000 sticks	US\$98.45
Cigars per kg	US\$126.74
Beer & liquor with less than 30% alcohol	: 30%
Liquor with more than 30% alcohol	: 100%
All wines	: 60%

FRESH FRUITS PRODUCT TRADE

- # Fresh fruit imports into Hong Kong grew consistently from 1992 to 1997 with an annual average growth rate of 7 to 8%.
 - C Growth was particularly significant in 1996 and 1997, driven by increases in re-exports, and also partly by increased local demand, as fruits are being perceived as part of a healthy diet.
- # Typically, 20 to 35% of fresh fruit imports are re-exported. The majority of re-exports are to China, and some to Southeast Asian countries.
 - C Hong Kong has historically been the transshipment point for Western and tropical fruits into China, and for Chinese fruits to Southeast Asia.
- # Hong Kong does not grow fruit. Therefore, there are no domestic fruit exports.

Hong Kong Fresh Fruit Imports 1992-1997



Source: Hong Kong Census
and Statistics Department
(HKCSD)

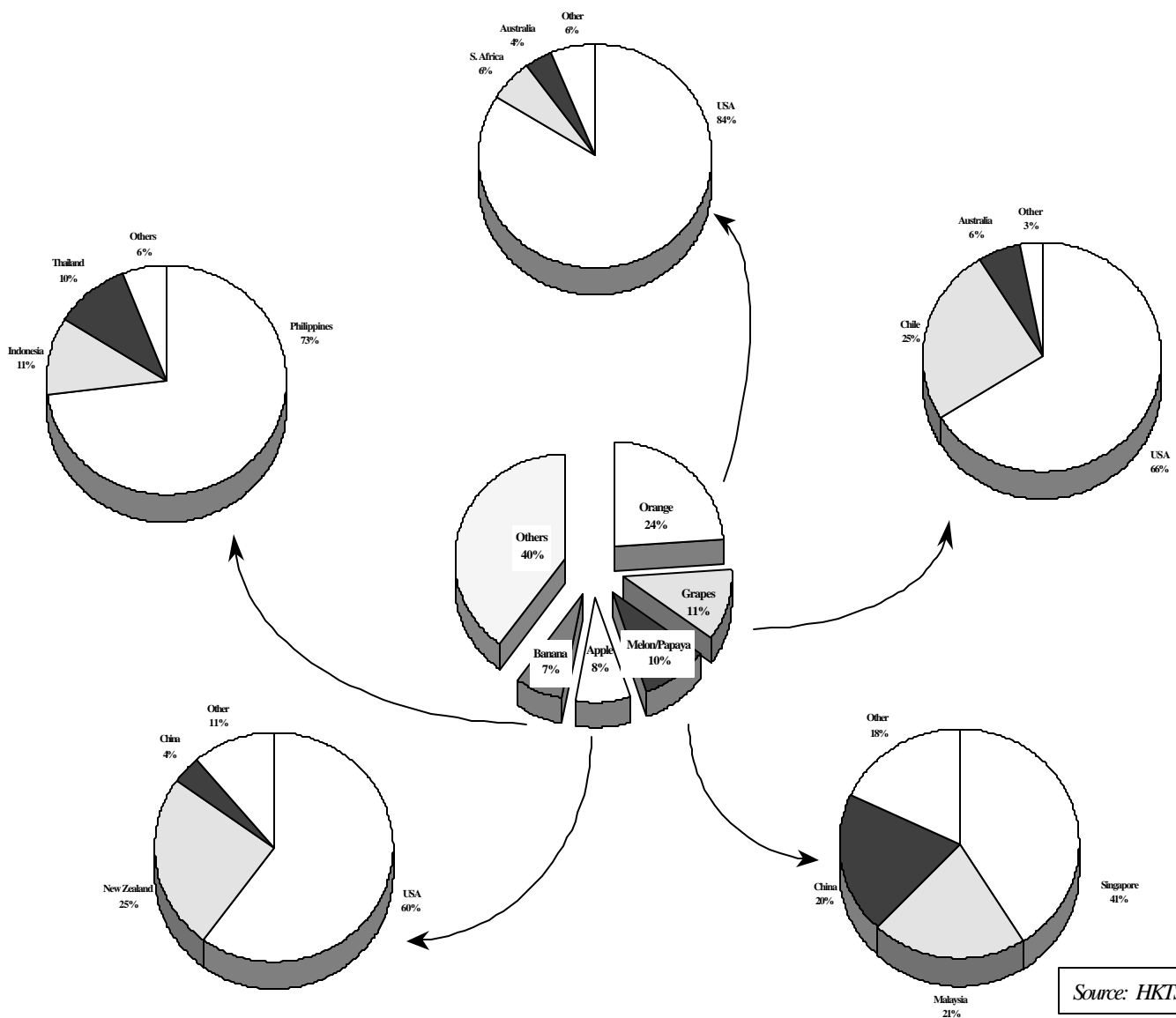
FRESH FRUIT PRODUCT TRADE BY TYPE

- # The six (6) most popular fruits imported into Hong Kong are **oranges, grapes, melons, papayas, apples,** and **bananas** (by descending order of popularity).
 - C The five most popular fruits account for 60% of total fresh fruit imports into Hong Kong.
 - C Other fruits of significant quantities include other citrus fruits, apricots, peaches, and pears.

- # The USA is the major supplier for most non-tropical fruits imported into Hong Kong, specifically oranges, grapes and apples.
 - C The USA dominates supply of oranges (84% of total imports in 1997).
 - C American grapes and apples are also popular (above 60% import share for each).

- # Tropical fruits are supplied to Hong Kong mostly from Southeast Asia.
 - C Singapore and Malaysia dominate Hong Kong's papaya supply, while the Philippines supplies a majority of mangoes and bananas to the Hong Kong market.

FRESH FRUITS PRODUCT IMPORTS BY TYPE

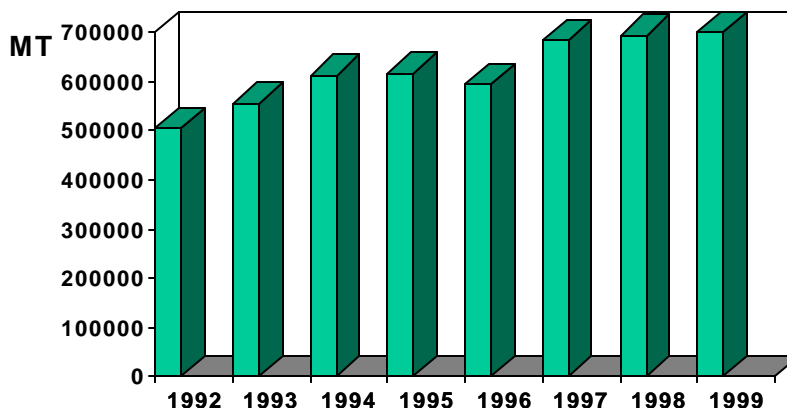


Source: HKCSD

FRESH FRUITS - LOCAL CONSUMPTION

- # Local fresh fruit consumption increased by 11% over the past 3 years.
 - C Local consumption of fresh fruits in 1997 was about 684,000 MT, representing a 15% increase over the previous year.
 - C As Hong Kong consumers became more health conscious about diet, fresh fruit became the selection in improving health, and consumption increased.
- # Fresh fruit consumption in 1998 and 1999 is expected to increase from 1997, but at a marginal rate.
 - C Fruit consumption in 1999 is expected to reach 700,000 MT.
 - C Most consumers in Hong Kong have understood that fruits are “healthy food”. The perception will continue to drive fresh fruit demand.
 - C However, as the market reaches maturity, growth is expected to be only marginal.

**Hong Kong Fresh Fruit Local Consumption
1992-1999**



*Source: Agricultural & Fisheries Department
(AFD)*

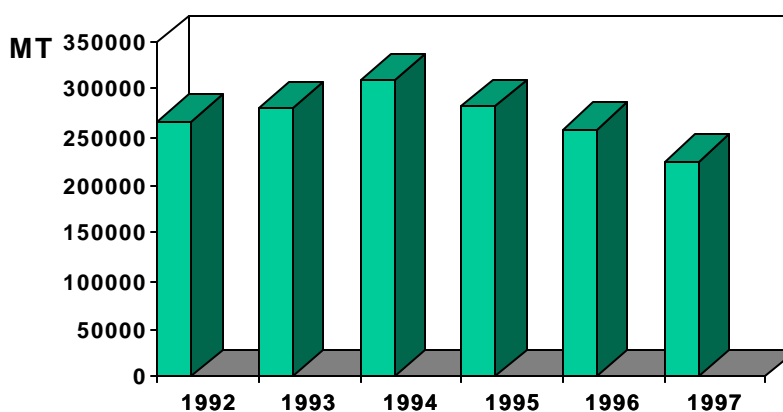
FRESH FRUIT - PRODUCT SEGMENTATION

Fruit Type	Historical Demand (1992-1997)	Near-term Outlook (1998-1999)	Rationale
Oranges	Increased consistently	Increase	C Sunkist's success has been the driving force for orange demand. C Oranges are perceived as a common and nutritious food for every household.
Apples	Increased consistently	Increase	C Similar to oranges, apples are perceived as a common and nutritious food.
Plums	Increased consistently	Increase	C Gaining popularity. C Dominated by USA products.
Grapes	Significantly increased	Flat or slightly increase	C Local consumers are well aware of the nutritional value of grapes. C Seedless and green grapes are expected to experience increases in demand over ordinary grapes.
Bananas	Moderately increased	Flat or slightly increase	C Catered to a smaller group of consumers. C Del Monte has been driving demand in Hong Kong.
Melons/ Papayas	Moderately increased	Flat or slightly increase	C Melon demand is expected to remain strong. C Hong Kong has not obtained the best quality papaya supply. C Serving a niche consumer segment. C Not a U.S. market segment, except for Hawaiian product if price is competitive.
Pears	Moderately increased	Flat	C Dominated and driven by Australian products. Quality U.S. product may compete on a seasonal basis.
Strawberries	Moderately increased	Flat	C Serving a niche market segment. C Strong USA market presence.
Apricots/ peaches	Moderately increased	Flat	C Serving a niche market segment (mostly foreigners)
Others	Flat or slightly increased	Flat	--

FRESH VEGETABLES PRODUCT TRADE

- # Overall, imports of fresh vegetables increased from 1992 to 1994, and declined from 1994 to 1997.
 - C The decline in 1994 to 1997 is due to the strong growth in the food service sector, particularly in the fast food segment, which drew consumers away from traditional home cooking.
 - C There has been a tremendous increase in Hong Kong people travelling and residing in Mainland China over the past four years, causing a decrease in the local demand of vegetables as the locals increasingly dine across the border.
- # 1998 is expected to see an increase in fresh vegetable demand as a weak Hong Kong economy is expected to turn consumers back to home cooking. Vegetable imports in 1999 are expected to remain stable from 1998.
- # Re-exports of most vegetable types followed the trend of imports, which peaked in 1994, and declined in 1995 to 1997.

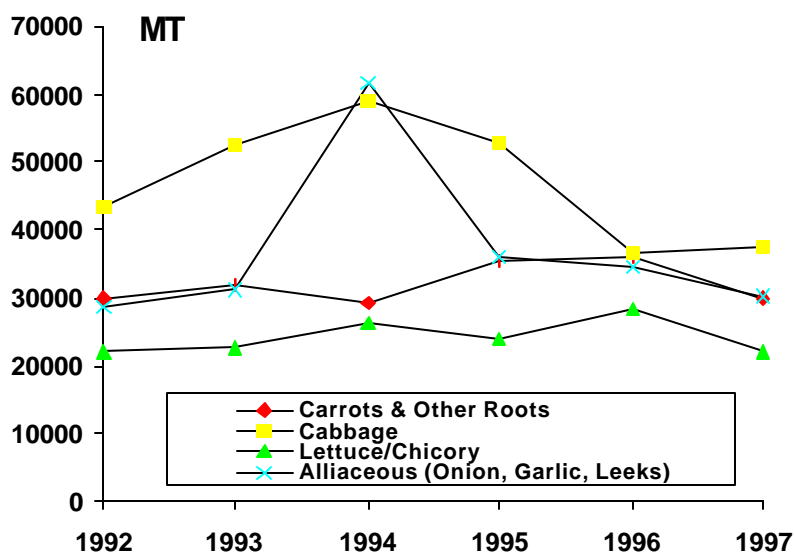
**Hong Kong Fresh Vegetables Imports
1992-1997**



Source: HKCSD

FRESH VEGETABLES PRODUCT TRADE BY TYPE

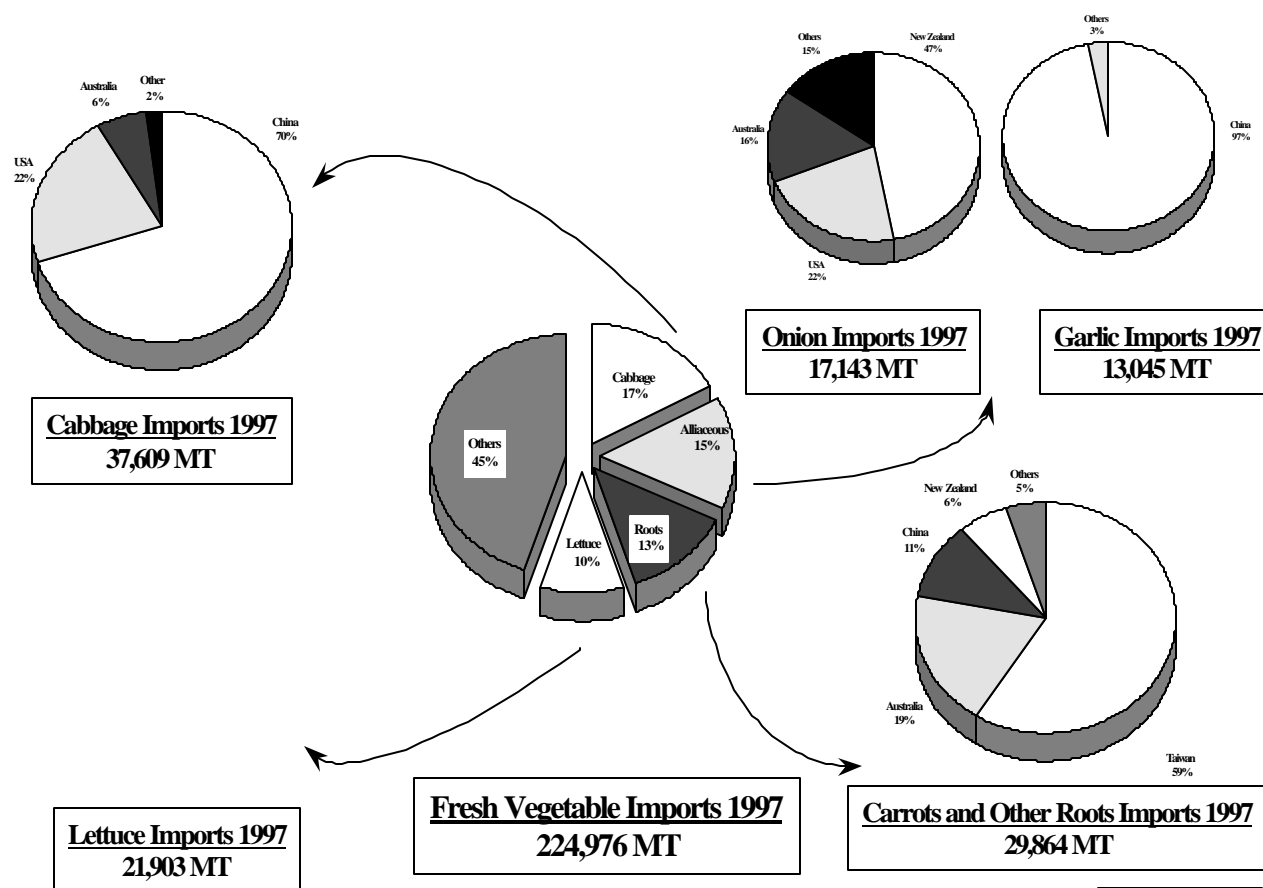
- # The five (5) most popular types of vegetables imported into Hong Kong are:
- C Cabbage (mostly Chinese cabbage)
 - C Alliaceous (garlic, onions, leeks)
 - C Carrots, turnips, and other roots
 - C Lettuce and chicory
 - C Chinese Vegetable
- # The five vegetable types together account for over 55% of total fresh vegetable imports.
- # Imports of the four most popular vegetables basically followed the trend of total vegetable imports, which declined from 1995 to 1997.
- # Re-exports of the above vegetables averaged less than 5% of total imports, except for the alliaceous, of which over 40% are re-exported.
- C Re-exports of alliaceous vegetables are mostly to Singapore and other Southeast Asian nations.



Source: HKCSD

FRESH VEGETABLES PRODUCT SUPPLY

- # China and the USA are dominant exporters of popular vegetables to Hong Kong.
- C China dominates the supply of garlic and cabbage.
- C The US dominates lettuce supply, and is also significant in onions.
- C Taiwan and Australia are dominant exporters of carrots and other root vegetables.



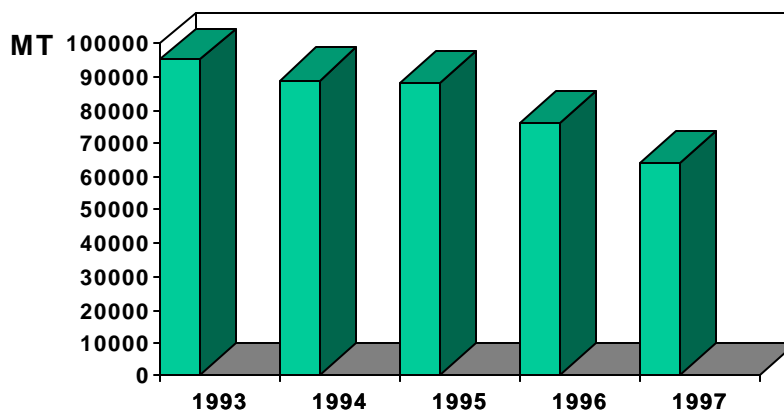
Source: HKTSD

Source: HKCSD

FRESH VEGETABLES - LOCAL PRODUCTION

- # In 1997, there were numerous vegetable farms in Hong Kong producing 64,000 MT of vegetables, which is about 20% of local consumption.
- # Local production has been declining significantly over the past five years.
 - C Local production declined over 30% from 1993 to 1997.
 - C Another 10-15% decline is expected by 1999.
- # Domestic vegetable exports have been insignificant. Therefore, it is assumed that all locally farmed vegetables are consumed locally.

**Hong Kong Vegetables Local Production
1993-1997**

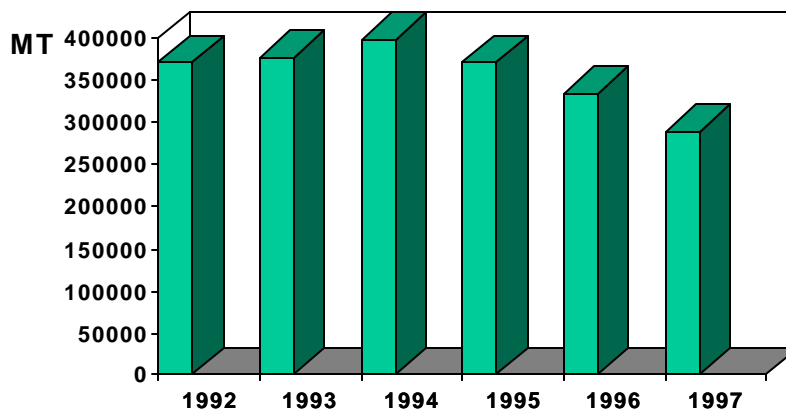


Source: AFD

FRESH VEGETABLES - LOCAL CONSUMPTION

- # Local consumption of fresh vegetables remained stagnant in 1992 and 1993. A decline occurred from 1994 to 1997, at an annual average decline rate of 5 to 6%.
- C As fast foods and convenience foods became more popular in the early to mid 1990s, Hong Kong people became avid restaurant and diner eaters, resulting in less home cooking and lower vegetable demand.
- # It is expected that increases in fresh vegetable consumption will occur during 1998.
- C The weak economy in 1998 resulted in reduced spending on restaurants and increased home cooking.
- C However, the expected increase in demand is moderate as fast food outlets and diners are not expected to be as seriously affected by the current economic situation.

**Hong Kong Vegetables Local Consumption
1992-1997**



Source: AFD

FRESH VEGETABLES - PRODUCT SEGMENTATION

Segmentation for various fresh vegetables are as follows:

Vegetable Type	Historical Demand (1992-1997)	Near-term Outlook (1998-1999)	Rationale
Cabbage	Decreased	Flat	C The market segment has matured without new applications.
Alliaceous	Decreased	Increase	C Driven by expected increase in demand for garlic as it is an essential ingredient in Chinese food preparation. C Onion and leek demand is expected to remain flat.
Carrots and other roots	Decreased	Flat	C The market segment is mature without new applications.
Lettuce	Flat	Increase	C Lettuce is a less expensive vegetable. C Lettuce is easy to prepare, clean, and without waste.
Cucumbers	Flat or slightly increased	Increase	C Gaining popularity with new applications. C An alternative product offered to consumers.
Broccoli	Increased	Increase	C Gaining popularity with new applications. C An alternative product offered to consumers.
Mushrooms	Slightly increased	Increase	C Well accepted by the consumer as a healthy and nutritious food.
Chinese Vegetables (Kai Lan, Choi Sum, etc.)	Slightly increased	Increase	C More Mainland Chinese immigrants will drive demand for Chinese vegetables.
Others	Decreased	Flat or moderate increase	--

DISTRIBUTION

- # Vegetables are considered an essential food in the Chinese diet. Distribution is facilitated and regulated by the Agriculture and Fisheries Department.
- # Fruits are not considered as essential for consumption. Distribution is not regulated.
- # There are four wholesale locations for vegetables and three for fruits in Hong Kong.

Vegetable Wholesale Markets

- C Cheong Sha Wan Vegetable Market
- C West Kowloon Food Market
- C The Western Wholesale Market (Hong Kong)
- C Northern Agricultural Trade Market

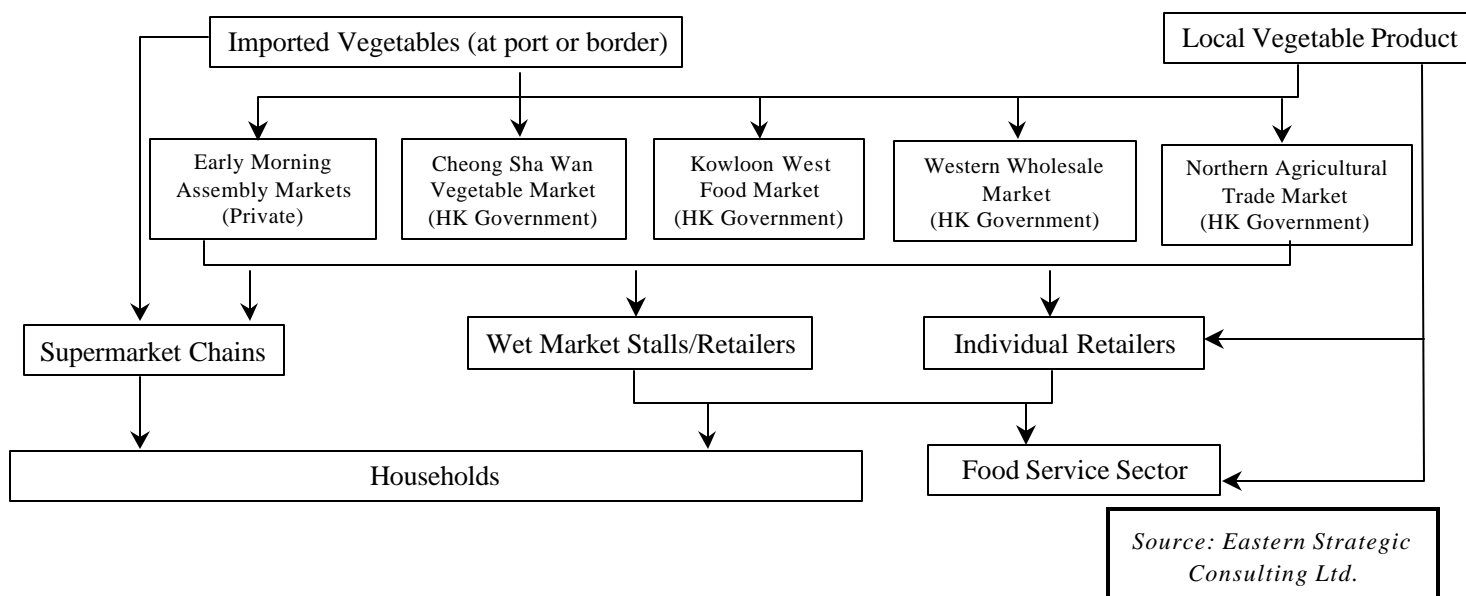
Fruit Wholesale Markets

- C Yau Ma Tei Fruit Market
- C The Western Wholesale Market
- C Cheong Sha Wan Fruit Market (operational mid 1998)

- C The four vegetable wholesale markets distribute over 80% of all vegetables to be consumed in Hong Kong, and the two fruit markets distribute about 75% of total local fruit demand.
- C Local vegetable farmers are required to sell their produce through the wholesale markets if they want to go beyond the boundaries of New Territories.
- C As there are no regulations on fruit distribution, a majority of wholesalers and retailers are private.
- # Private retailers of fruit and vegetables acquire their products from the wholesale markets which are then distributed through private stalls and wet markets.

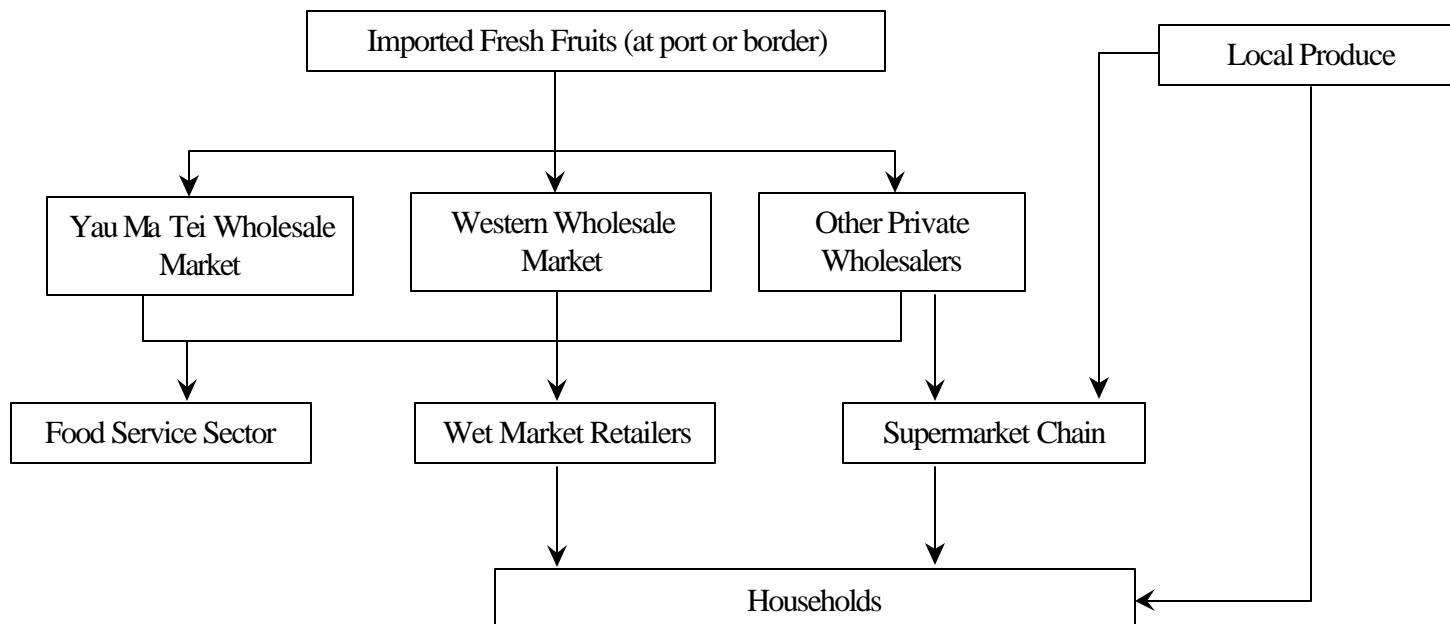
FRESH VEGETABLE DISTRIBUTION

- # Over 80% of locally consumed fresh vegetables are distributed through the four wholesale markets.
 - C The wholesale markets distribute most of the imported vegetables plus a small portion of local products.
 - C Only direct imports by large supermarket chains (specifically Park’N Shop, Wellcome, and Dah Chong Hong) bypass the wholesale market distribution process.
- # Three of the four wholesale markets operate under the management of the Hong Kong government. The market spaces are rented to private wholesalers to perform wholesale activities.
- # Cheong Sha Wan Vegetable Market operates under the Vegetable Marketing Organization (VMO), which performs the following functions:
 - C Ensures quality compliance through laboratory testing.
 - C Facilitates and determines prices on a day-to-day basis.
 - C Monitors a distribution quantity for retailers.
- # There are several private vegetable wholesale markets in Hong Kong where private wholesalers and retailers deal in local and imported fresh vegetables.
 - C These wholesale activities are carried out before dawn. They are therefore known as “early morning assembly markets”.



FRESH FRUIT DISTRIBUTION

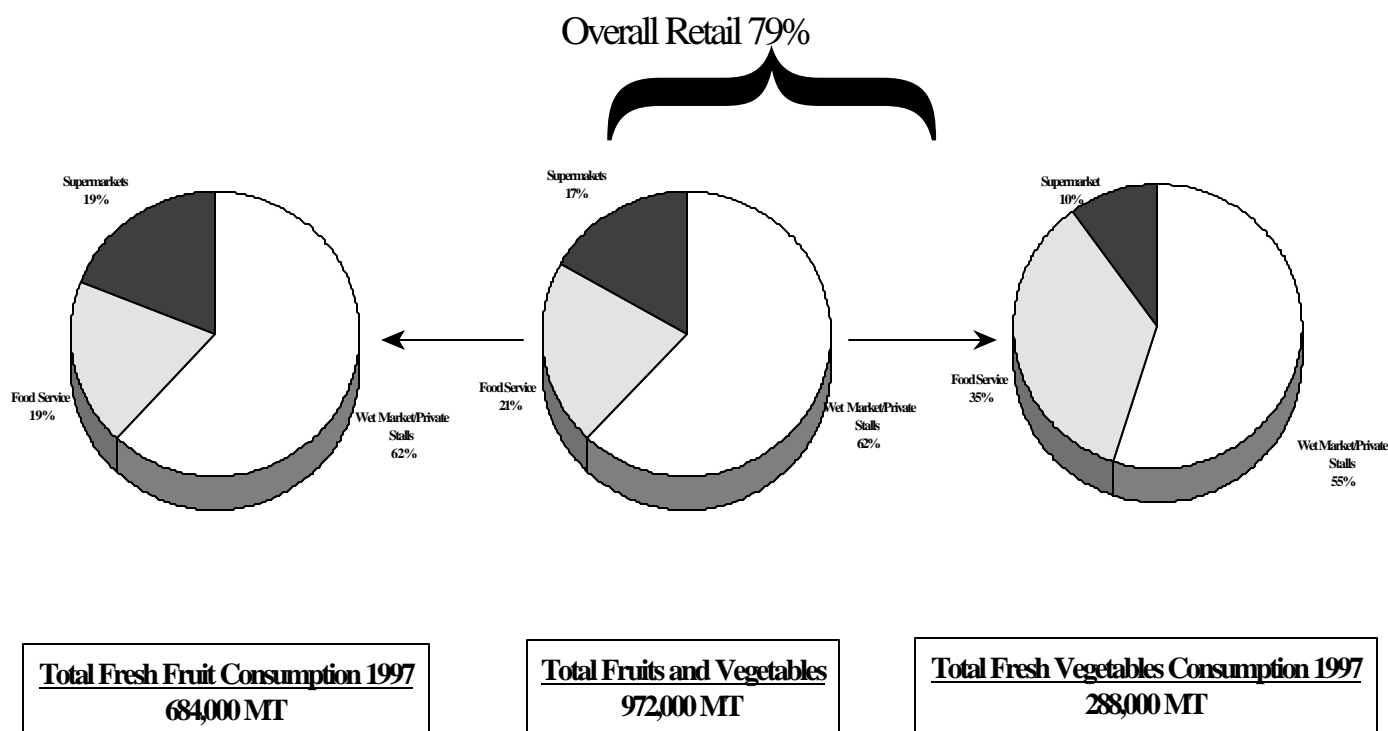
- # About 75 to 80% of fresh fruits in Hong Kong are distributed through two wholesale markets.
- C Of the two wholesale markets for fruits, only the Western Wholesale Market is managed by the Hong Kong government. Yau Ma Tei market is privately run.
- C The VMO does not play any role in the distribution of fresh fruits.
- # Large supermarket chains import fresh fruits directly.
- # Other supermarkets and food service outlets obtain fresh fruit from private wholesalers or from the wholesale markets.



Source: Eastern Strategic Consulting Ltd.

DISTRIBUTION BY SEGMENT

- # Overall almost 80% of fresh fruits and vegetables in Hong Kong are distributed through retail channels.
 - Ç The wet markets and private independent stores are the most dominant in distribution.
 - Ç This segment is expected to increase in distribution share during 1998.
- # The food service sector accounts for 21% of the total fruit and vegetable demand.
 - Ç However this segment is expected to fall below 20% in 1998.
- # Supermarkets have historically not been the popular locations for fruit and vegetable purchases.
 - Ç Most Hong Kong consumers feel that the wet market stalls sell the freshest fruits and vegetables.



Source: Eastern Strategic Consulting Ltd

MARKETING AND PROMOTIONS

- # Promotional efforts tend to focus on fresh fruits rather than fresh vegetables.
- # Fresh fruits, specifically oranges, apples, plums, and grapes have been advertised on local TV.
 - C Sunkist is the most aggressive with TV advertising, followed by Washington State Apples.
 - C The TV advertisements have yielded desirable results as Sunkist and Washington State Apples practically dominate Hong Kong's orange and apple markets respectively.
- # Most US fruit suppliers distribute posters to private retailers for display in their shops and stalls (e.g. Sunkist, Washington State Apples, California grapes, Del Monte, etc.)
- # Large supermarket chains also promote fresh fruits through discount coupons to shoppers.
- # As for fresh vegetables, promotion tends to be focused only at supermarkets.
- # The US government offers a Market Promotion Access Program to most fresh fruit and some vegetable suppliers through U.S. non-profit Agricultural Associations. This program assists suppliers through marketing and advertisement activities.
- # The US Agricultural Trade Office in Hong Kong is available to offer help to American companies and their local distributors to more effectively promote their products by facilitating and organizing seminars, conferences, and introducing alliances.

Agricultural Trade Office
American Consulate General
18th Floor, St. John's Building
33 Garden Road, Hong Kong
Tel: (852) 2841-2350
Fax: (852) 2845-0943
E-Mail: ATOHongKong@fas.usda.gov
Internet Homepage: <http://www.usconsulate.org.hk/ato>

RULES AND REGULATIONS

As Hong Kong is a free port, there are no import duties on fresh fruits and vegetables.

- # For imports into Hong Kong, a health certificate is required to certify that fruits and vegetables are produced and shipped under hygienic conditions, and samples inspected using a test method approved by the country of origin.
 - C The health certificate must also certify that the produce is fit for human consumption, and free of pesticides or other materials which may be harmful or poisonous.

- # For fresh vegetable imports, they will most likely go through the major wholesale markets for sample inspection and distribution.

- # Details of import regulations can be obtained from the Hong Kong government, Department of Health at Wu Chung, 18th Floor, 213 Queen's Road East, Wanchai, Hong Kong.
 - C Also, the Health Department provides hotline service for import regulation at (8520 2380-2580).

RECOMMENDATIONS

In Hong Kong, fresh vegetables are considered essential food items and , therefore, their trade and distribution facilities are monitored (through VMO). On the other hand, fresh fruit is not widely monitored because it is “officially” not considered an essential food item.

Fresh Fruit

- C Currently, the USA is the leading supplier of oranges, grapes and apples to the Hong Kong marketplace. Interestingly, the demand for oranges and apples is expected to increase and a supply gap will emerge representing an opportunity for American growers. This opportunity is for both existing suppliers, such as Sunkist and Washington State Apples, and new suppliers. This market is open for new participants.
- C Plum suppliers should take advantage of consumer positive attitudes toward plums. The market demand will increase for this fruit and it is recommended that increased market development, promotional and advertising activities will result in higher volumes and expanded market share of the total fresh fruit market in Hong Kong.
- C Papayas are not widely supplied from the USA. However, premium papayas from Hawaii may be able to secure a niche market position at the high-end distribution channel customers if pricing is competitive.

Fresh Vegetables

- C The overall vegetable market has declined in recent years and is expected to bottom-out in late 1998. USA suppliers should consider an aggressive program to expand the market position (at the expense of China and other exporters). Promotional programs with incentives to selected retailers (e.g., Park N Shop, Wellcome) may be in order. It is cautioned, however, that it is costly to carry-out these promotional programs due to the highly competitive situation caused by the poor economy. The expected market penetration and market share increases need to be weighed against the cost-benefit. Overall the increase would be rated as moderate.

CONTACTS

Agriculture and Fisheries**Department**

Census and Statistics Department
Wan Chai Tower One
12 Harbour Road
Tel: (852) 25824736/7

Customs and Excise**Department**

8/F, Canton Road Government
Offices
393 Canton Road, Kowloon
Hong Kong
Tel: (852) 27332265

Health Department

Hygiene Division
Wu Chung House
Queen's Road East
Wanchai, Hong Kong
Tel: (852) 29618807
Fax: (852) 2893 3547

**Hong Kong Trade Development
Council**

38th Floor Office Tower
Convention Plaza
1 Harbour Road, Wanchai
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Tel: (852) 25844333
Fax: (852) 28240249

Hong Kong Vegetable**Marketing Organization**

Cheung Sha Wan Wholesale
Vegetable Market
Lai Chi Kok Road, Cheung Sha
Wan
Hong Kong
Tel: (852) 28021367

Hong Kong Food Council

1/F CMA Building
64-66 Connaught Road
Central, Hong Kong
Tel: (852) 25428600
Fax: (852) 25414541

Asia Provision Co. Ltd.

King Wah Road, North Point
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Fax: (852) 28878014

**China Resource Purchasing Co.
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China Resources Building
Harbour Road, Hong Kong
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Dah Chong Hong Ltd.

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Kowloon Bay, Hong Kong
Tel: (852) 27683388
Fax: (852) 27968838

Park'n Shop Ltd.

Box 250 Shatin Post Office
New Territories
Hong Kong
Tel: (852) 26068833
Fax: (852) 26953664

Wellcome Company Ltd.

ATL Centre
Berth 3, Container Terminal
Kwai Chung, Hong Kong
Tel: (852) 24895888
Fax: (852) 24899627

**Fish Vegetable Marketing
Organizations**

757 Lai Chi Kok Road, Kowloon
Hong Kong
Tel: (852) 23878648
Fax: (852) 27287883

CONTACTS

List of Important Government Web Sites and E-Mail Addresses

Department	Web Site	E-Mail Address
Census and Statistics Department	http://www.info.gov.hk/censtatd/	genenq@censtatd.gcn.gov.hk
Company Registry	http://www.info.gov.hk/cr/	crenq@cr.gcn.gov.hk
Consumer Council	http://www.consumer.org.hk	cc@consumer.org.hk
Financial Secretary's Office Business and Services Promotion Unit	http://www.info.gov.hk/bspu/	bspuenq@bspu.gcn.gov.hk
Economic Services Bureau	http://www.info.gov.hk/esb	esbuser@esb.gov.hk
Trade and Industry Bureau	http://www.info.gov.hk/tib/	--
Department of Health Headquarters Clinical Genetic Service Government Virus Unit Special Preventive Program	http://www.info.gov.hk/dh/index.htm -- -- http://www.info.gov.hk/health/aids	dhenq@dh.gcn.gov.hk cgs@hk.super.net wllim@hk.super.net aids@health.gcn.gov.hk
Industry Department	http://www.info.gov.hk/id	industry@id.gcn.gov.hk
Trade Department	http://www/info.gov.hk/trade	dcsn@trade.gcn.gov.hk
Hong Kong Trade Development Council	http://www.tdc.org.hk	hktdc@tdc.org.hk